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Age biases in employment:

Impact of talent shortages and age on hiring

- Marie Wilson, Polly Parker and Jordan Kan

Age biases in employment:

Impact of talent shortages and age on hiring

With an ageing workforce, discrimination against older workers is also on the rise. So how are New Zealand employers choosing job candidates – and why?

Professor Marie Wilson
Dr. Polly Parker
and Jordan Kan

Those over 40 years of age make up approximately 44 percent of New Zealand's population. By 2051, this will increase to 54 percent of the population, with over 25 percent of the population aged 65 and over.¹ The steady rise in the number of older workers in the labour force has been accompanied by increased evidence of discrimination against them, both in New Zealand and internationally. For example, recent studies have demonstrated increased periods of unemployment for older workers, and perceptions by older workers - often based on statements by employers - that age was the primary barrier to employment.²

Internationally, research has highlighted that age-based stereotypes distort employment markets, and reduce the perceived employability of older workers who are seen as less adaptable.³ These stereotypes also limit New Zealand employment for older workers, resulting in characterizations of those over 45 as less adaptable, creative and flexible than their younger counterparts.⁴ Internationally, older workers are more likely to be made redundant, less likely to be up-skilled and/or retrained, and increasingly face barriers to employment entry.⁵

As a nation, however, New Zealand relies on full participation in the labour force, and in an era of critical labour shortages,



ROBIN WHITE, *Landscape, Auckland*, 1971, screenprint.
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the deployment of scarce skills and accumulated knowledge capital is central to both economic and social development. Assumptions regarding full employment during years of peak earnings (typically 40 plus) also underpin the social welfare and superannuation planning of the country, as they do for most individuals and families. Age-based discrimination undermines both personal and national productivity, and limits the growth and productive capacity of firms. To make matters worse, the assumptions behind age-based discrimination are largely false.

Older workers are not less adaptable, often possess rare and complex intellectual capital, provide longer and more reliable service to their employers, and have fewer accidents, injuries and occasion fewer workplaces losses than their younger, and

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often more expensive, colleagues.⁶ Despite this, older workers encounter an increasing number of barriers in employment. These barriers may be overcome, however, both by legislative means and through education of employers. In many contexts the “taste for discrimination” is overcome by market forces, as severe talent shortages focus employers on skills alone, overcoming prejudices based on gender, age and ethnicity. The moderating effect of talent shortages on barriers to job entry is particularly well-documented in the healthcare industries throughout the OECD, where worker shortages have dramatically increased workforce diversity (in terms of gender,

study that involved a review of the resumes with managers and recruitment consultants to surface considerations and concerns related to age.

AGEISM AND DISCRIMINATION

The term “ageism” was first coined by Dr Robert Butler in *The Washington Post* in 1969.⁷ According to Butler, ageism is “a process of systematic stereotyping and discrimination against people because they are old, just as racism and sexism accomplish this for skin colour and gender”. From the psychological perspective, stereotypes and prejudices are socially rather than biologically determined. Negative images of aging are instilled in socialisation processes through language, religion, literature, the media and the practices of medical institutions and social services. From this perspective, Branine and Glover⁸ offered their definition of ageism as “a form of prejudice which use perceived chronological age in forming judgements about people, and age discrimination as acts based on such prejudice.”

Discrimination based on age may occur in many aspects of life, including access to education and training.

Discrimination based on age may occur in many aspects of life, including access to education and training, credit, transport, housing, services and employment. Discrimination research often concentrates on employment related aspects, including stereotyping, undervaluation of ability and potential, and denial of development opportunities. In addition, the literature tends to focus on “older workers”, particularly those 50 years of age or above.⁹ Stereotyping and the resulting discrimination can have both positive and negative consequences; in the context of age discrimination at work, the effects may enable or hinder the older worker.

Positive discrimination on the basis of age may include favourable treatment relating to physical activities, such as exemption from heavy lifting, and reduced or non-compulsory overtime and non-social hours of work. Additionally, age may help older employees to receive recognition in relation to experience, knowledge and skills built up over the years. Some studies suggest that older workers are favoured in their access to certain types of work, particularly managerial or supervisory roles.

Executive Brief

The steady rise in the number of older workers in the labour force has been accompanied by increased evidence of discrimination against them, both in New Zealand and internationally. A field experiment, simulation and interviews were used to assess the selection process from multiple perspectives and enable a thorough consideration of both the process and outcome of recruitment and selection decisions. The research also attempted to assess the impact of industry talent shortages, using current immigration service listings of skills shortages in New Zealand to target jobs with high, medium and low skill shortages. The study assessed employer preferences (were the applicants seen as suitable), employment outcomes (were applicants short-listed) and employer rationales (why were some candidates preferred over others). Our findings indicate that younger workers were seen as more suitable and were significantly more likely to be short-listed, although this effect was moderated by talent shortages.

ethnicity and age) in a very short period of time.

This study explores the nature and rationales for age-based discrimination, as moderated by talent shortages in the New Zealand labour market in 2006. This is an exploratory study in three parts: first, a field study of matched resumes (of differing ages) mailed to advertised sales and nursing jobs in the North Island; second, a short-listing simulation for sales, nursing and HRM positions, placing the matched resumes amongst a broader group of resumes to allow us to see not just whether candidates “made the cut”, but also how they are evaluated by managers in these sectors; and finally, a policy capturing

About the study

This research was designed using a multi-staged, multi-method approach, providing a cross-sectional snapshot of current labour market recruitment conditions in New Zealand. A field experiment, simulation and interviews were used to assess the selection process from multiple perspectives and enable a thorough consideration of both the process and outcome of recruitment and selection decisions.

In the field study and the short-listed simulation, we were

assessing the impact on short-listing of age of the applicant (20-something, 40-something or 50+); gender (in study two); and the industry effects (high, medium and low talent shortages). The dependent variable in both studies was being short-listed, and in the simulation study, we were able to assess the perceived suitability of candidates as well.

We also attempted to assess the impact of industry talent shortages, using current immigration service listings of skills shortages in New Zealand to target jobs with high, medium and low skill shortages. Consistent with similar international studies, nursing was identified as a

The field study

The study was a field experiment, carried out by using written applications and resumes to apply for 75 advertised positions (a method pioneered by Jowell and Prescott-Clarke in 1969,¹⁵ and applied to age discrimination by Bendick in 1996¹⁶). The positions sought were non-managerial, non-entry roles in either consumer (FMCG) sales (47 positions) or general nursing (28 positions), neither of which are specifically age-stereotyped roles.

Three-page resumes were sent in response to advertised positions that appeared on-line and in the newspaper in the greater Auckland area over a two month period. All of the positions applied for were carefully checked for suitability by matching the description requirements with candidate's resume profile. All three candidates' resumes were sent for the same position once the suitability was established. Each of the applicant's resumes included position-

Negative discrimination, however, is typically associated with restricted access to training and development opportunities,¹⁰ or to employment overall, particularly for non-managerial posts, including projects and promotions that may be seen as "wasted" on an older worker who is well qualified.¹¹ These disadvantages particularly affect the recruitment and selection process, as an older worker who struggles to achieve meaningful employment is effectively barred from development, productivity and ongoing experiences within the workplace (which may also be discriminatory).

Shen and Kleiner¹² suggested that discriminatory behaviours in the hiring process occurred as a direct result of the prejudices and stereotypes employers hold with respect to chronological

job category with critical skills shortages, sales as a job classification with moderate skills shortages and human resource administration as a job category with low skills shortages.

The third part of the research involved interviewing 20 employers and recruiters, and having them review the resumes and provide "advice" to the applicants and comment on their employment preferences more generally. Interviews were recorded and transcribed, and then coded thematically using a grounded theory approach.

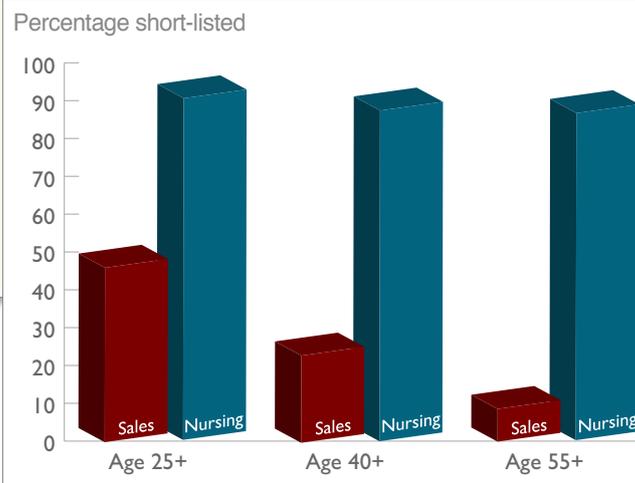
relevant experience for the last five years, as well as a relevant (and equivalent) tertiary qualification.

The key difference between the applicants was their apparent age; the youngest was mid twenties, the middle about 40, and the oldest approximately 55. The age of the applicants was signalled by prior job history (presented in summary format), and year of secondary school and tertiary completion. All applicants were Anglo-Saxon males with "ordinary" first and surnames. From a human capital perspective, the candidates were equivalent, or if broader or lengthier working experience were seen as relevant, then older workers would be preferred.

The under-representation of older applicants in the final

short-list was statistically significant in Study 1 (Pearson $\chi^2_{2, 72} = 8.95$, $p < .01$). However, there was no evidence of barriers to older workers in nursing; highly significant patterns of discrimination in the jobs with lower talent shortages dominated the overall model.

APPLICATIONS FOR ADVERTISED POSITIONS:



age. In a youth oriented society, older workers – particularly females – are seen as less attractive and less likely to be selected for positions. A typical negative stereotype

across both males and females associates increasing age with decreasing levels of performance and/or productivity. This stereotype is not evidence based and there are no documented performance deficits based on age, except in jobs requiring high levels of physical stamina or endurance. For example, Yeara and Warr¹³ have determined that there are no differences in the overall sales performance of older and younger employees.

While physical capacity does decline with age, in a knowledge economy these considerations relate to a small (and decreasing) proportion of jobs and workers. Indeed, the accumulated knowledge and networks of older workers should have considerable value in knowledge and service-based firms. Therefore, age contributes to determining the value of individual's human capital – the logic being that an older person would have accumulated greater human capital in both education and experience. This may be countered, however, if the knowledge or other capital resources becomes "obsolete".

From a human capital perspective, older and more experienced workers would be preferred when considering a firm's human capital accumulation. However observations of labour market activities reveal the opposite. An increasing number of older personnel are made redundant during economic downturns, and younger applicants are hired when demand for labour increases.¹⁴ From a human capital perspective, this may be due

The short-listing simulation

The study involved a short-listing simulation for an HR, nursing or sales position. The three male resumes from the field experiment were paired with three equivalent female resumes and four other resumes from less qualified applicants (2 male, 2 female).

As in the field study, all resumes had relevant – and equivalent – experience and qualifications, and differed only in the apparent age of the applicants. 240 managers from the relevant industries (65 healthcare managers for the nursing position, 93 marketing managers for sales posts; and 82 general managers for the HR advisor post) were asked to rate each candidate's suitability and then provide a shortlist of candidates for interview.

The instrument "portfolio" included a very detailed, three-page job

to "technology shocks" that make previous experience less valued and increase the value of more recent qualifications. Human capital rationales may also lead to employers favouring the young as representing a longer future income stream and greater development opportunity than older workers.

Our research question pursued both stereotyping and its outcome in selection decisions in the New Zealand labour force. We were interested in whether there were any differences in selection preferences between workers of

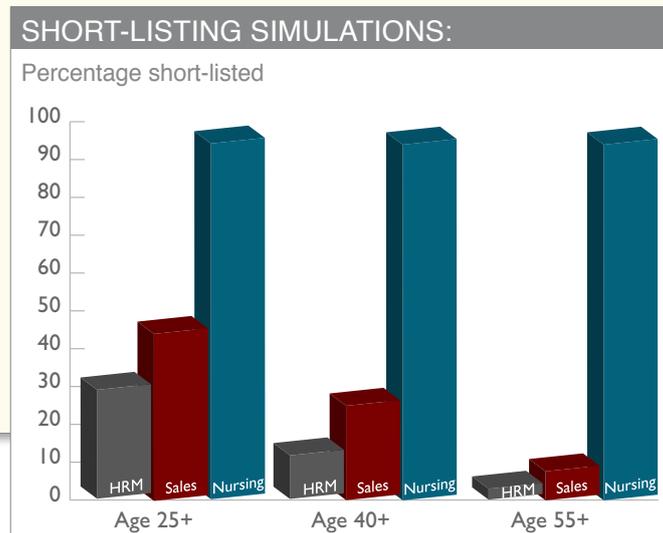
While the preference patterns are similar across industries, short-listing patterns are very different.

different ages, and whether these varied in industries with critical talent shortages. We were also interested in the role of agents in the process, and whether recruiters differed from employers in the recruiting and selection preferences. Finally, we were interested in what influenced employers in their consideration of older candidates; particularly what considerations and concerns informed their evaluation of older applicants. Our hypotheses were that, consistent with the popular press and prior New Zealand research, older applicants might experience some slight disadvantage. Given human capital theory, we expected this to be lessened if there were talent shortages in the field, and heightened if there was an oversupply. Further, we expected recruiting agencies to reflect employer profiles and to demonstrate similar patterns of

description and an equally detailed person specification. The resumes were presented in alphabetical order by applicant name. At the bottom of each resume, space – and rating scales – were provided for the reviewer to rate the applicant on their suitability for the position (from "clearly unsuitable" to "excellent match"). Participants spent 20-30 minutes carefully reading the job description and person specification and making notes, before rating each candidate and compiling a final shortlist.

The under-representation of older applicants in the

final short-list was statistically significant in the simulation study (Pearson $\chi^2_{2,196}=194.236, p<.001$). However, the findings were similar to the field study; there was no evidence of barriers to older workers in nursing; highly significant patterns of discrimination in the jobs with lower talent shortages again dominated the overall model.



the applicants seen as suitable?), employment outcomes (were applicants short-listed?) and employer rationales (why were some candidates preferred over others?).

IMPACT OF AGE AND INDUSTRY EFFECTS

The results from both the field study and the short-listing simulations showed that the older candidates were less preferred and seen as less suitable. While the preference patterns are similar across industries, short-listing patterns are very different. There is a clear effect for industry in short-listing. All qualified candidates were short-listed for nursing roles, regardless of age or gender, but age and gender effects became increasingly pronounced in sales (medium) and HR (low talent shortage). Given that all had equivalent experience and qualifications, we might expect that these proportions would be reflected across the final shortlists: 1/3, 1/3, 1/3 by age. However, the positive responses occurred far less for older candidates in the field study, and short-lists in the simulation study included far fewer of the older candidates than the younger. See sidebars for detailed findings.

IMPACT OF RECRUITERS

Recruiters may heighten discrimination effects at the level of short-listing. In fields where age effects are over-ridden by labour shortages, recruiters are even more likely to respond to older candidates than employers, pursuing every possible skilled worker. In fields where there are more applicants, they



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Effect of age and gender on perceived suitability and short-listing

The analysis of variance (ANOVA) of perceived suitability for the role shows a significant main effect for age ($F_{2,232}=31.25, p<.001$). In both the field study and the simulation, older candidates (both 40+ and 55+) were rated far behind their younger counterparts. While the difference between ratings for the oldest and youngest candidates was large (Cohen's $d = .91$), the difference between the 40+ and 55+ subgroups was smaller (Cohen's $d = .32$).

Multivariate analysis demonstrates an interaction effect for age of applicant by gender in the second study ($F_{8,618}=3.158, p<.05$), with age being slightly more disadvantageous for female applicants, particularly in sales and HR roles. Age alone accounted for over 40% of the variance in the rating of candidates, while gender contributed an additional 7%.

It is clear from these results that the older candidates were less preferred and seen as less suitable.

are more discriminatory than employers, favouring younger workers over older workers twice as often. These differences are moderately significant, (Cohen's $d = .71$), but limited both by small numbers and the greater likelihood of a response by the employers than the recruiters for sales positions.

RATIONALES FOR CHOICES AND PREFERENCES

In discussions with potential employers, the key factor that differentiated older and younger employees was the assumed flexibility and adaptability of younger workers. The younger applicants were described as “trainable”, easy to “get up to speed” and “go-getters”. In contrast, 40-something applicants were described as “settled” and older applicants as “set in their ways” and “resistant to change and technology”.

This was highlighted in the e-mail feedback given by one employer to the three “candidates” who applied (remember that they had identical objective fit for the post. See “The field study” sidebar for details). The youngest applicant was invited in for a chat, to discuss whether he would like to train for the post, with a message that “while your experience isn't a perfect match, we'd like to discuss your interest in learning about our product line

and adapting to our needs”. The middle-aged candidate – with the same experience – was told by the same employer that his “experience was not relevant”, and the 55+ candidate was told “that his qualifications didn't meet the requirements of the company”, despite no qualification being specified, and that the older candidate had equivalent or better qualifications than the other two, younger, candidates.

A minority of interviewees, primarily recruiters, expressed a belief that the older candidates would be more expensive to hire, in terms of their salary expectations, while also suggesting that younger workers had higher turnover and might be more expensive in the long run. This was expressed even in healthcare, despite the fact that age impact was not possible as pay scales in nursing are related strictly to years of nursing experience and training, thus making all candidates the same from a potential pay perspective. One recruiter noted that it was in their interest to have applicants who looked good on hire, but left after a few years, as it created “repeat business” for the recruiters. It is also interesting

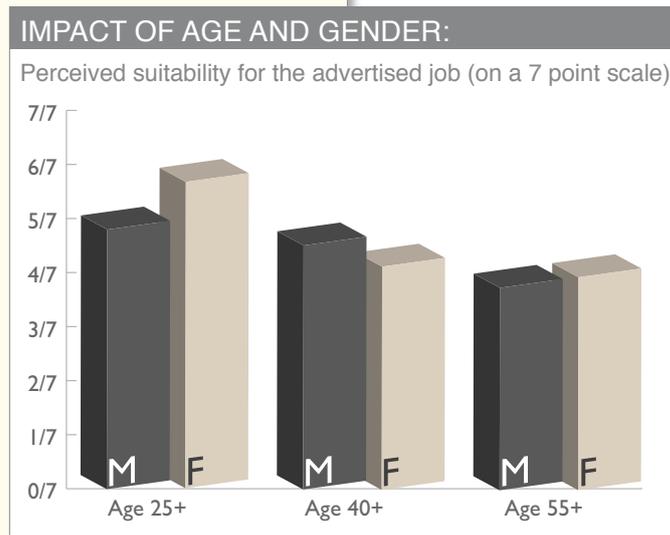
to note that recruiters were much more likely to ask to retain resumes for future job opportunities or to call back the younger “applicants” for other opportunities. This “repeat” function makes recruiting agencies even more meaningful gateways, and even more significant discriminators, as only the youthful applicants received follow-on opportunities.

For both employers and recruiters, the career comments were even more paradoxical. All applicants had five years of job-relevant experience, and all had prior experience in other industries of varying lengths of time (to signal their age). However, the 25+ applicant was described as “settled”, after having five years in the current career, while the 40+ as “restless” for having made a career change five years earlier, and the 55+ as “unstable” with the same profile. This ignores both labour market requirements for flexible and multi-skilled workers and the growing evidence about “boundaryless” and multiple careers throughout a lifetime.

DISCUSSION

The focus of this study was the effect of age of applicants in the short-listing phase of selection. Multiple cues are linked to age, and while it is a more ambiguous signal than those related to race, ethnicity and gender, employers and recruiters were very skilled at estimating age based on years of experience and types of qualification.

Increasing age has a cumulative, and negative, effect on the selection outcomes of applicants. These findings are consistent with the previous literature on influence of age on selection



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decisions, and in the 55+ age group suffering particular hardship in jobs that are not age-stereotyped for older workers. Both the selection outcomes and the solicited rationales reinforce the international research findings that show entrenched age discrimination in employment in Anglo-Saxon contexts.

The lower perceived suitability of older applicants may be explained by the concept of age-based stereotyping, which involves uses of (negative) occupational schemas by members of one group to judge members of another. Given that all

applicants in the pool actually possessed more than the stated qualifications and experience for the job, the low to average ratings for older applicants suggest that the raters' bias is driven by age-schema rather than by objective differences in job or applicant characteristics. This is consistent with the outcomes of the policy-

capturing study, which demonstrated age-stereotypical characterisations of applicants.

We note that while recruiters and employers are increasingly sensitive to possibly discriminatory "readings" of rationales and attributions regarding ethnicity and gender, few had any insight into ageist statements and feedback provided within the study. Respondents were comfortable stating "facts" that included common (and incorrect) characterisations of older workers as resistant to change and unable to adapt to new technology. Recruiters amplified these effects, wanting to send on to employers those they knew would "fit in" to the employment ideal contracted for, and exclude older, qualified applicants.

Most importantly, context does matter. The more serious the labour shortage, the more likely all candidates who met skill thresholds were to be short-listed, even though employers still harboured preferences for younger workers.

Discrimination has economic and social consequences which must be addressed by policy as well as in practice.

CONCLUSION

The first scholarly article demonstrating employment discrimination was published over forty years ago. Our series of linked studies demonstrates that, despite significant socio-legal and demographic changes in the ensuing thirty-plus years, age-based employment discrimination persists. It also demonstrates that, contrary to suggestions that older workers are excluded for good reason, that managers are not acting rationally when they ignore or disadvantage older workers in their hiring.

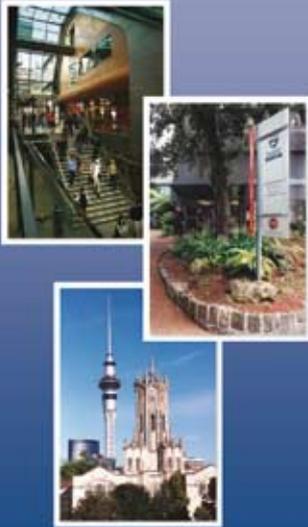
Advancing age does limit access to employment for older workers, despite equivalent – and some would argue greater – human capital. The stereotypes appear to be consistent with earlier research and serve to limit access by older workers to relevant employment. Across age groups, additional problems arise for older females in some roles, an effect that is heightened overall in mediated recruiting and selection situations, where agents may increase biases. The combination of effects may prevent companies who are actively seeking talent from finding it in their applicant pools. The review of the literature indicates that the implications from rejection of job applications can be wide-ranging. At an individual level, biases in selection reduce the probability of receiving a job offer and provide lower returns to job search, leading to an increasingly demoralised body of unemployed and under-employed older workers. At a macro level, this also indicates that employers are unable to tap and capitalize on the valuable talent that older workers bring to the labour market.

IMPLICATIONS FOR PRACTICE

As the workforce ages, opportunities for ageism may also increase, despite talent shortages. Discrimination has economic and social consequences which must be addressed by policy as well as in practice. At the level of national policy, the combination of the youthful OE and barriers to employment

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for older workers only deepens the talent shortage. For both managers and HR specialists, this research should serve as a reminder that employment discrimination may be a continuing problem, both from a social perspective, as well as from an employment perspective. Moreover, no employer can afford to overlook talent; an inability to see skills and abilities across all applicants is unsustainable.

How can this potential problem be addressed? Aside from increased awareness and continued training to combat stereotyping and employment bias, the findings of international research suggest that well-trained and diverse selection panels may moderate some discriminatory effects. Our interviews discovered many examples of young recruiters who only recruited others like themselves. Ensuring that recruiters and selectors of all ages have interaction and contact

with a broad cross-section of the labour market – to reduce their inherent stereotypes - may also help. For companies that outsource their recruitment, this is a reminder to clearly focus the recruitment on skills required, and emphasize that age is not a limitation.

At a more fundamental level, these results suggest that there is a substantial legal risk for companies, demonstrated by both anecdotes and the research results. Not hiring on the basis of age is not just bad business, it is clearly illegal under the Human Rights Act (1993).¹⁷ Companies that cannot overcome such biases will struggle to recruit and retain quality staff, and may face increasing legal challenges.

For job-seekers, it suggests that their suspicions / reservations regarding reasons for rejection may be well-founded. There is an excellent match between reported rationales from both employers and applicants with regard to age-related biases; applicants do receive different messages and enjoy different levels of opportunity based on their apparent age. Increased awareness of stereotypes may cause some applicants to re-think how they present themselves in a job search, to increase their chances of getting short-listed and selected for employment. This is not to suggest that they should dye greying hair or leave off relevant experience, but rather that – bearing in mind age-based stereotypes – applicants may benefit from emphasizing flexibility, career orientation, technological savvy and relevant skills that meet the job requirements in their initial letters and CVs, to position themselves effectively and overcome initial biases.

Not hiring on the basis of age is not just bad business, it is clearly illegal under the Human Rights Act.

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